ISBN 0-7729-2848-7

$100

Ontario Ministry of Skills Development

Hon. Alvin Curling, Minister

Inventory of Training Modules for Purchasing Occupations

(within the Ontario Government)

14-6016 (09-87)

88-04887/

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INVENTORY OF TRAINING MODULES

FOR

PURCHASING OCCUPATIONS

Ministry of Skills Development

Alvin Curling, Minister

@ Queen's Printer for Ontario 1987

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PREFACE

The Inventory of Training Modules for the purchasing occupations within the Ontario Government includes all of the associated competencies as defined by the occupational analysis (DACUM/Competency Chart).

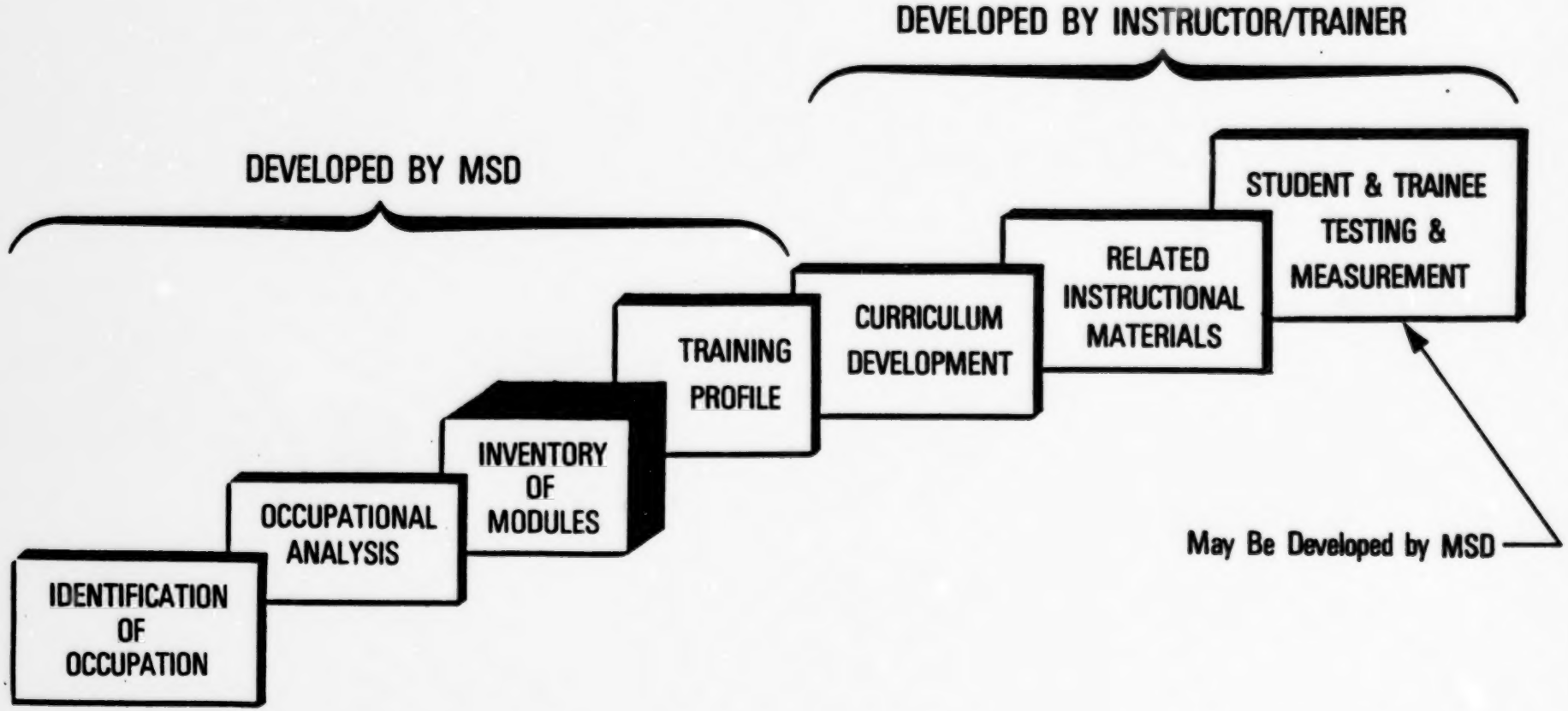
This inventory is for use by program developers and trainers as a resource document in the development of training courses and programs. It provides the minimum provincial performance standards for training to the competencies identified by qualified purchasing personnel from Ontario ministries. It provides an information base from which training modules relevant to these occupations can be accessed and training courses or programs developed.

This Inventory of Training Modules is based on tasks identified through an occupational analysis from which training modules are developed. Such modules contain Tasks, Terminal Performance Objectives (TPOs), and Enabling Objectives (EOs). Criteria and conditions established within each TPO define the minimum acceptable performance standards for training.

General educational courses appropriate to training needs are not included in this inventory, but are expected to be incorporated in the training programs by the program developer and trainer.

This Inventory of Training Modules, as a component of the program development process, is illustrated on page 7.

THE INVENTORY OF MODULES IN THE PROGRAM DEVELOPMENT PROCESS



ACKNOWLEDGEMENTS

The Ministry of Skills Development acknowledges, with gratitude, the assistance of representatives from the Ontario government ministries in identifying and validating the competencies required for Purchasing Occupations. These representatives were selected on the basis of diversity of expertise to form committees to develop and validate DACUM/Competency Charts which would become the basis for this inventory of modules. The following were members of the DACUM committee:

Mr. Jack Drury	Ministry of Education
Mr. John MacEachern	Ministry of Transportation and Communications
Mr. Elton Martin	Ministry of Correctional Services
Mr. Harold McKissock	Ministry of Government Services
Mr. Rob Mitchell	Ministry of Community and Social Services
Mr. Larry Otis	Ministry of the Solicitor General
Mr. Peter Renz	Ministry of Housing
Mr. Doug Sibley	Ministry of Natural Resources

Facilitators

Mr. Rick Embree	Humber College of Applied Arts and Technology
Mr. John Hart	Humber College of Applied Arts and Technology

The Ministry of Skills Development gratefully acknowledges the assistance of representatives from the various Ontario Government Ministries in the writing and validating of modules for Purchasing Officer 2. These representatives were selected on the basis of diversity of expertise to form a module writing committee. The following were members of the module writing committee:

Mr. Paul Churchill	Ministry of Transportation and Communications
Mr. George Cowie	Ministry of the Attorney General
Mr. Kevin Hein	Ministry of Natural Resources
Mr. John Holland	Ministry of Revenue
Mr. Walt Jurgen	Ministry of the Solicitor General
Ms. Maryloo Kallio	Ministry of Labour
Ms. Shivani Khanderia	Ministry of Housing
Ms. Joy Macdonald	Human Resources Secretariat
Mr. Les Miscampbell	Centennial College of Applied Arts and Technology
Ms. Jennifer St. Aubyn	Ministry of the Environment
Mr. George Tattle	Ministry of Community and Social Services
Mr. Don Vaillancourt	Ministry of Consumer and Commercial Relations
Ms. Robina Wood	Ministry of Treasury and Economics

Mr. John Lissack, Program Coordinator, Ministry of Skills Development, represented the Ministry as project coordinator, with the assistance of Mr. Shon Sorensen of the Ministry of Skills Development.

INTRODUCTION

This inventory of training modules contains:

(a) Training modules which consist of:

  (i) Tasks as identified by the occupational analysis;

  (ii) Terminal Performance Objectives (TPOs) which identify the required behaviour, the conditions, and the minimum acceptance performance standards;

  (iii) Enabling Objectives (EOs) which identify the knowledge and skills required to successfully achieve the TPO;

(b) DACUM/Competency Chart.

This volume of training modules provides the minimum performance standards for training to the competencies identified for Purchasing Occupations by qualified representatives of the ministries of the Government of Ontario. Such standards are stated in performance objective terms.

LISTING OF MODULES

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Ontario Ministry of Skills Development

Gregory Sorbara, Minister

Training Module

Module Title REVIEW REQUISITIONS

No. U1971

Module Objective

EXAMINE REQUISITION TO ENSURE SUFFICIENT INFORMATION HAS BEEN GIVEN TO START PROCUREMENT PROCESS.

Date SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1971.01	determine if requisition should be processed	Determine if requisition should be returned for alternate method of purchasing, such as: . local purchase . petty cash . stock items . services Return requisition to sender with explanation Log requisition for processing when applicable	Return inappropriate requisitions because purchase order not required according to ministry policies and procedures.
1971.02	confirm signing authority and entitlement	Ensure signing authority is current, matches requisition and entitlement	Check Signing Authority Book for: . signature, . spending ceiling, . commodity restriction.
1971.03	vet requisition for completeness and acceptability	Determine necessary details have been supplied, such as: . full product description . quantities . shipping address . budget code . delivery date . special instructions . special approvals . supporting documentation	Review requisition for completeness to determine that all data required to issue a purchase order are supplied.
1971.04	obtain additional or corrected information from requisitioner	Notify requisitioner of reasons for returning requisition, such as: . requirement for clarification of specifications . special approval requirements	Obtain additional or corrected information by returning requisition or contacting requisitioner.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1971.04	(continued)	. budget code . delivery date	
1971.05	assign priority to requisitions	Sort requisitions by: . date received . date required . requisitioner/program . lead time . requirements of vendor	Determine: . date received, . urgency of need, . program priority, . lead time.
1971.06	determine potential sources for goods/services	Ensure sources, goods and services, product lines meet program needs and are obtained from qualified vendors Establish qualified vendor list Ensure fair and equal opportunity for all vendors	Determine potential sources for goods/services by receiving: . standing agreements; . government-wide surplus lists; . ministry vendor list; . other ministries' vendor lists; . trade journals; . yellow pages.
1971.07	determine method of procurement by estimating inclusive cost of goods and services	Determine method of procurement: . single source . telephone quotes . written quotes . formal tenders . previous sources Identify relevant: . taxes . duty charges . delivery conditions and charges	Determine method of procurement as established by ministry policies and procedures by obtaining total costs of goods and services

Ontario Ministry of Skills Development

Gregory Sorbara, Minister

Training Module

Module Title

SOURCE PRODUCT/SERVICE

No.

U1972

Module Objective

OBTAIN VERBAL QUOTES WITHIN SPECIFIC DOLLAR LIMITS AND SET UP TENDERING PROCESS FOR LARGER AMOUNTS.

Date

SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1972.01	select single source where justified	Estimate cost Review policy and select single source if appropriate Complete purchase by issuing (single source) purchase order	Select single source under specific value, based on ministry's established policy.
1972.02	obtain and record verbal/telephone quotes up to a specific dollar limit	Estimate cost Select source(s) Obtain verbal quotation(s) and record Evaluate and issue purchase order	Obtain verbal/telephone quotes from required number of vendors according to current ministry policies and procedures.
1972.03	obtain written quotations between specific dollar limits	Estimate costs Select source(s) Obtain written quotations and record Evaluate and issue purchase order	Obtain written quotes from required number of vendors in accordance with current policies and procedures.
1972.04	prepare written specifications for goods and services for formal tender	Develop: . detailed specifications . performance specifications . delivery specifications . design specifications . packaging specifications . installation specifications . warranty/commercial terms . liability . cancellation clause . terms and conditions	Prepare written specifications for goods and services for acquisition by formal tender by completing specifications.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1972.04	(continued)	. terms and methods of payment	
1972.05	develop evaluation criteria	Develop objective evaluation criteria, such as: . technical performance . performance standards . cost effectiveness . service . Canadian content . delivery . willingness to sign contractual agreement . ability to obtain bond . references . regional economic development . completeness of bid submission . terms and conditions	Establish objective/measurable criteria for inclusion in tender document.
1972.06	obtain legal branch approval of terms and conditions	Send terms and conditions of draft tender to legal branch Obtain written legal opinion Make required changes	Ensure legal branch has reviewed the terms and conditions.
1972.07	form evaluation committee	Select committee consisting of: . purchasing . user/client . specialist (as required) . others (as required)	Form evaluation committee to review and evaluate bids and recommend successful bidder.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1972.08	advise Industrial Development Review Branch of intent	Forward to Institutional Products and Procurement Section, Business Development Branch of the Ministry of Industry, Trade and Technology, copies of tender documents, evaluation criteria and supplier list, as per Management Board directives Receive approval to proceed Add additional suppliers if required	Ensure Industrial Development Review Branch is advised of all tenders requiring their review.
1972.09	prepare vendor list	Review all government vendor lists Review ministry's internal lists Check commercial catalogues and trade directories Select appropriate vendors Confirm vendors are qualified and interested Finalize list to whom tenders will be sent	Compile list of qualified suppliers.
1972.10	review tender documents	Proofread tender documents for errors (grammar, typo's, etc.) Make corrections if necessary	Ensure all tender documents are reviewed for completeness and accuracy.
1972.11	issue tenders	Select distribution method: . mail . courier . pick-up . telex	Distribute tenders to selected vendors, using most appropriate distribution method.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1972.11	(continued)	. FAX Retain official copy of tender document in file Ensure return documents/other enclosures are included Advise public tenders office and ministry tenders office of distribution (when/where necessary) Forward copy of tender to client, as required	
1972.12	conduct vendor briefing	Log in vendors who attend briefing Review documentation Respond to questions and provide clarification on specific tender issues Keep minutes and confirm decisions in writing Conduct site visits where necessary	Ensure vendors are fully briefed.
1972.13	prepare amendments	Prepare amendments Provide all vendors with amendments, such as: . technical revisions . change to closing date	Issue amended documents if necessary, in advance of tender briefing.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1972.13	(continued)	Advise user/client of amendments Provide documentation for file Ensure copies are in competition file Revise evaluation criteria if required	

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Gregory Sorbara, Minister

Training Module

Module Title EVALUATE FORMAL WRITTEN TRANSACTIONS.

No. U1973

Module Objective

DOCUMENT AND EVALUATE FORMAL VENDOR SUBMISSIONS.

Date SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1973.01	confirm submissions and time of arrival are correctly recorded	Ensure control of tender documents by: . stamping the documents with date and time . verifying timeliness by ensuring deadline date and time are met . recording receipt of tender documents . ensuring security of documents (e.g. tender box)	Confirm submissions and time of arrival are correctly recorded to: . validate submissions, . ensure control of tender documents.
1973.02	open tender box and record vendor submissions	Verify : . date and time . open valid bids . record responses . return late bids with explanation	Open tender box. Compile record of vendor submissions received by compiling record of vendor submissions received.
1973.03	prepare and complete spread sheet	Transfer information from tender to spread sheet, such as: . price . delivery dates . warranty . service . installation . taxes . Canadian content . F.O.B. point Verify calculations, such as: . totals . extensions . taxes Highlight lowest qualified bidder Note exceptions	Compile a detailed summary of all submissions for purchasing evaluation.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1973.04	analyze and prepare report on submissions	Analyze submissions for: . variation in specs . meeting delivery requirements . lowest bidder . service requirement . rating of bidders . Canadian content . comparison of warranties Finalize report	Provide report with analysis for evaluation committee.
1973.05	convene evaluation committee	Assemble committee members to: . discuss analysis . document end-user concerns . resolve issues/concerns, such as: . capability of recommended vendor to deliver product . reliability of product . compatibility of product with existing equipment/systems Reach agreement on recommendation	Convene evaluation committee to review evaluations report and recommend successful bidder.
1973.06	confirm successful vendor's qualifications	Conduct site visit if required Request: . audit statement . Dun & Bradstreet report . performance bonds Check references Confirm production ability Conduct pre-qualification/testing of product	Confirm successful vendor's qualifications: . financial stability, . ability to provide goods/ services, . references.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1973.06	(continued)	Confirm acceptance of successful bidder or rejection of bidder Repeat process with second bidder as necessary Continue process until successful bidder identified	
1973.07	prepare summary report with recommendation	Prepare formal recommendation with detailed explanation	Recommend successful bidder to client and obtain approval.
1973.08	seek secondary approval	Obtain Institutional Products and Procurement Section, Business Development Branch of the Ministry of Industry, Trade and Technology approval if required Obtain ministry management approval if required Obtain Management Board approval if required	Obtain mandatory approval as required by government policies and procedures.

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Training Module

Module Title AWARD CONTRACTS AND ISSUE PURCHASE ORDERS

No. U1974

Module Objective

AWARD CONTRACTS, ISSUE PURCHASE ORDERS
AND DEBRIEF UNSUCCESSFUL BIDDERS.

Date SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1974.01	confirm and document terms and conditions	Decide on document to be used, such as: . letter of intent . contract . purchase order Transfer terms and conditions from tender document to contract document Proofread document Confirm terms and conditions with supplier Clarify any discrepancies with legal branch Renegotiate and reconfirm as required Amend terms and conditions as necessary	Confirm and document terms and conditions to protect interests of all parties.
1974.02	obtain purchase order approval	Determine total dollar value Identify approvals required Prepare covering document as required Obtain signatures on document as required	Obtain necessary purchase order transaction approval in accordance with current ministry/government policies and procedures.
1974.03	confirm award	Contact vendor to advise of intent to award order Issue letter of intent Confirm acceptance by vendor	Confirm award to vendor verbally/in writing.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1974.03	(continued)	If non-acceptance: . advise client . renegotiate . reconfirm award in accordance with revised terms and conditions Repeat with next vendor as necessary	
1974.04	issue purchase order/contract	Obtain necessary signature on purchase order/contract Distribute copies to ministry Issue purchase order/contract to supplier Obtain supplier signature on contract document as necessary	Approved purchase order/contract awarded.
1974.05	advise unsuccessful bidders	Advise unsuccessful bidders verbally or in writing	Advise unsuccessful bidders of successful bidder as required by ministry policies and procedures.
1974.06	debrief unsuccessful bidders	Convene meeting with unsuccessful bidder(s) and evaluation committee Explain reason for award to successful bidder Respond to questions Confirm in writing if required	Provide formal debriefing session for unsuccessful bidders as required.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1974.07	inform decentralized offices of supply arrangements	Prepare copies of the following documents: . standing agreements . blanket orders . stationery catalogues . collective purchase agreements . service contracts Prepare covering memo as required Distribute copies to field locations	Distribute copies of supply document to field locations.

Ontario Ministry of Skills Development

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Training Module

Module Title

EXPEDITE CONTRACTS AND FOLLOW UP PURCHASE ORDERS/CONTRACTS

No.

U1975

Module Objective

CHECK DELIVERY STATUS, SOLVE PROBLEMS CREATED BY NON-AVAILABILITY OF GOODS AND GOODS WHICH ARE NOT ACCEPTABLE.

Date

SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1975.01	contact vendor to establish delivery status	Contact vendor by: . telephone . telex . FAX . memo . electronic data transmission Confirm delivery date Record decision	Confirm delivery date with supplier.
1975.02	advise user of delivery status	Confirm delivery to client by: . telephone . telex . FAX . memo . electronic data transmission	Confirm delivery to user and document.
1975.03	negotiate substitutions or alternates with vendor and client	Contact vendor Identify concerns Discuss possible solutions Identify acceptable alternatives Recommend alternative solutions to client Obtain acceptance/non-acceptance of client Advise vendor Renegotiate or cancel purchase order and document reasons Confirm and document when acceptable	Renegotiate and confirm revised supply arrangements.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1975.04	receive advice from user of unsatisfactory/damaged goods	Receive notification of unsatisfactory goods from: . client . receiving . vendor such as: . incorrect quantity . damaged goods . wrong colour/size . incorrect item received	Ensure client satisfaction by resolving unacceptable substitutions or improper goods.
1975.05	inspect unsatisfactory/damaged goods	Ensure inspection of unsatisfactory goods Identify problem Establish liability Ensure third party inspection performed if necessary by: . carrier . insurer . vendor as necessary	Provide client satisfaction by resolving unacceptable situations.
1975.06	document and advise of unsatisfactory/damaged goods	Prepare report of results of inspection: Complete claim documents as necessary for damaged goods, such as: . vendor claim . carrier claim . insurance claim	Prepare and complete documentation of unsatisfactory/damaged goods.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1975.06	(continued)	Complete claim documents as necessary for unsatisfactory goods, such as: . shortage . wrong colour/size . delivery to wrong location Advise client of action taken, such as: . claim submitted . vendor notified . replacement	
1975.07	arrange pick up and exchange of goods (when necessary)	Contact vendor/carrier Obtain confirmation of pick-up date, place Advise client/shipper of arrangements and when problem will be resolved Ensure return documentation is completed	Ensure pick-up and exchange, if goods defective.
1975.08	negotiate solution to problem of unsatisfactory goods with client and vendor	Convene meeting with client and vendor if necessary Negotiate and document acceptable solution	Confirm acceptable negotiated solution with client and vendor.
1975.09	prepare purchase order amendment	Indicate changes on original purchase order, such as: . substitutions . delivery date . quantities . price . cancellations	Issue purchase order amendment and distribute.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1975.09	(continued)	Sign and distribute amendments to: . client . vendor in accordance with ministry policies	

Ontario Ministry of Skills Development

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Training Module

Module Title

AUDIT DECENTRALIZED PURCHASES

No.

U1976

Module Objective

MONITOR TRANSACTIONS CARRIED OUT BY DECENTRALIZED AGENCIES AND ASSIST IN REDUCING COSTS.

Date

SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1976.01	provide approval for local purchase of items on restricted list	Receive request for local purchase approval Review request and rationale Approve/reject request Provide service centrally for rejected request	Issue approval for local purchase of items on restricted list.
1976.02	monitor decentralized transactions	Check for: . completeness of purchase orders . purchases in excess of signing authority . missing orders . adherence to standing agreements and standing orders . compliance with procedures . single source purchases for compliance to policy . unusual/unique purchases . repetitious/piecemeal purchase which may be avoiding tenders/approval levels . items requiring special approval . uneconomical use of purchase orders . items designated as central purchase	Ensure compliance with ministry and government policies and procedures.
1976.03	confer with decentralized agencies about purchasing procedures and practices	Contact decentralized agencies and discuss or clarify discrepancies and practices by: . site visits . meetings . memos . telephone Resolve problems Recommend withdrawal or restriction of authority for non-compliance	Ensure decentralized agencies comply with procedures and practices.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1976.03	(continued)	Reassign authority and document action taken Provide procedure update by: . memo . directive . issuing new policy	

1976.04	identify repetitive purchases of same commodity for consolidation and standardization	Review local purchase orders:
		. monthly
		. quarterly
		
		Identify and segregate repetitive items for consolidation
		
		Evaluate potential dollars saved by calculating:
		. economic order quantities
		. minimum order quantities
		. maximum order quantities
		. estimated annual usage
		. savings of:
		  . time
		  . staff
		
		Proceed with preparation of purchasing documentation in compliance with government policies and procedures
			Identify consolidation opportunities to effect cost reduction.

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Training Module

Module Title

ADVISE CLIENTS/VENDORS ON PURCHASING POLICIES AND PROCEDURES

No.

U1977

Module Objective

ADVISE CLIENT ON GOVERNMENT PROCEDURES AND VENDORS ON HOW BEST TO SELL TO GOVERNMENT AGENCIES.

Date

SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1977.01	act as team member for purchase of goods/services for large/complex projects	Receive request for project team participation or Establish a project team	Contribute policy/procedures advice and purchasing expertise to the project team.
1977.02	advise clients/vendors of Management Board's directives and guidelines and ministry policies and procedures	Provide explanation and interpretation for: . tender conditions . mandatory/optional common services . ministerial manuals . provincial manuals . blanket orders	Ensure that purchases are made in compliance with ministry policies.
1977.03	advise user on miscellaneous costs	Provide advice on: . taxes . tax exemptions . duties . brokerage fees . special freight considerations such as: . air freight cost . controlled environment cost . special packaging and handling costs	Provide client with general advice on miscellaneous costs.
1977.04	analyze client needs	Contact client Discuss needs Identify requirements Examine alternatives Select best solution	Assist client in identification of needs and provide solution.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1977.04	(continued)	Implement	
1977.05	market purchasing services	Market services by: . making presentations to clients and vendors . paying visits . input to bulletins and publications . distributing information through memos/letters . customer service	Market purchasing services.
1977.06	advise vendors on how to sell to government and ministries	Advise through: . attending meetings . attending trade shows . reviewing publications . responding to enquiries . providing commodity specifications to clients . providing list of potential client contacts to vendors . assisting in completing vendor registration form . advising vendor of potential product requirements	Provide information to vendors on how to sell to government and ministries.
1977.07	arbitrate between vendor and client	Investigate issue with both parties Negotiate a satisfactory solution Document if necessary	Resolve issues to the satisfaction of client and vendor.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1977.08	identify purchasing irregularities for referral to supervisor/manager	Identify irregularities that: . conflict with policy/procedures . lack documentation . require purchase confirmation Forward all documentation to supervisor/manager Make recommendation and request direction from supervisor/manager	Refer contentious issues to supervisor/manager.
1977.09	communicate with client to request proposals, tenders, specifications	Circulate information to client on: . future tenders . future requests for proposals . intended specifications . proposed consolidation activities . new stock items . lead time	Ensure effective, economical fulfillment of client needs.

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Training Module

Module Title

PERFORM ADMINISTRATIVE FUNCTIONS

No.

U1978

Module Objective

PERFORM ADMINISTRATIVE FUNCTIONS THROUGH COMMUNICATIONS AND KEEPING NECESSARY RECORDS.

Date

SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1978.01	maintain vendor list	Review list Update list by: . receiving vendor registration . deleting non-operative vendors' names . removing names of unsatisfactory vendors according to ministry policy . adding/subtracting recommendations from the Ministry of Government Services Interview company representatives Receive notifications of change of vendors' address	Ensure vendor list is current and accurate.
1978.02	serve as ministry representative	Attend such meetings as: . commodity committee . trade shows . workshops . seminars Participate in: . task forces . projects: . inter-ministry . intra-ministry . educational programs . member service groups	Represent ministry as delegated.
1978.03	compose reports/correspondence	Compose: . letters . memos . agreements . reports	Compose factual and accurate reports or correspondence.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1978.03	(continued)	Prepare monthly operating reports, such as: . MBR's . production reports . usage reports	
1978.04	maintain personal/working files	Set up working files Record pertinent data in personal journal, such as: . issues . resolution of problems . documentation . historical information Obtain samples for Purchasing Branch use such as: . fabric . paint colours . wood veneer . carpet Maintain telephone directories and telephone contacts	Ensure necessary information available in order to complete assigned responsibilities.
1978.05	maintain library of commodity catalogues, samples, prices	Set up working files Update pricing information Establish reference library, including: . trade directories . telephone books . catalogues . consumer reports	Ensure current library of information available in order that purchasing section can complete assigned responsibilities.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1978.06	operate personal computer with associated hardware	Acquire necessary skills to operate application software Operate PC/word processing equipment to generate: . spread sheets . correspondence . form letters . management reports . mailing lists . tenders . vendor lists . requisition logs . asset lists . purchase orders	Use data processing technology to effect efficiency of operation.
1978.07	provide input to ministry policy and procedures	Make suggestions/recommendations to supervisor/manager Explain rationale for recommendation Indicate process to effect recommendations Estimate savings: . dollars . time Monitor results after approval	Provide input to ministry policies/procedures with reference to purchasing practices.
1978.08	form liaisons with financial department	Respond to inquiries on: . pricing . lost purchase order copy . hold-back of payments . early payment discounts . quantity discrepancies . tax or freight discrepancies	Maintain an effective working relationship between finance and purchasing services.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1978.08	(continued)	Expedite payments Provide advice and guidance Report value of orders to selected vendors	
1978.09	form liaison with other government ministries	Attend informal inter-ministry meetings to: . share information . discuss common problems Attend formal inter-ministry meetings, such as: . purchasing council . commodity groups . educational groups	Establish and maintain an effective transfer of information to ensure achievement of ministry objectives.

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Training Module

Module Title CONDUCT PRODUCT RESEARCH AND MONITOR MARKET

No. U1979

Module Objective

RESEARCH AVAILABILITY AND USEFULNESS
OF NEW PRODUCTS AND TRENDS.

Date SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1979.01	conduct product research	Attend: . trade shows . information seminars . product demonstrations Conduct site visits Conduct and document analyses Utilize independant testing Make recommendations as required	Maintain current product knowledge.
1979.02	consult with suppliers to obtain product information	Conduct interviews with supplier representatives to elicit information on products and services Distribute information to ministry colleagues Advise client if appropriate	Maintain working relationships with suppliers. Ensure an exchange of information.
1979.03	review trade/technical journals and manufacturing standards	Subscribe to appropriate journals and publications, such as: . CSA (Canadian Standards Association) . ASTM (American Society for Technical Manufacturing) . CGSB (Canadian Government Standards Board) . Purchasing Digest . Modern Purchasing	Interpret journals and/or standards. Apply to specific needs.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1979.04	establish liaison with manufacturers and Ministry of Industry, Trade and Technology on development of new products	Identify client requirements Interview manufacturers Meet with Ministry of Industry, Trade and Technology to source Ontario manufacturers Provide information to client Document information with purchasing	Satisfy client requirements. Stimulate economic growth. Establish list of new product lines available.
1979.05	investigate and document unacceptable goods and services	Arrange trial demonstrations of goods and services Evaluate performance against predetermined criteria Document results Debrief vendors Distribute findings to clients and other staff as required, such as: . Ministry of Government Services . other purchasing departments . Government of Ontario Purchasing Council	Ensure qualified vendors are used.
1979.06	conduct market research	Maintain awareness of: . market trends . new products and technologies Be aware of future ministry program needs Conduct trials of new equipment, services, products	Ensure suitable goods and services are available to meet program needs.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1979.06	(continued)	Evaluate results Keep clients informed	

Ontario Ministry of Skills Development

Gregory Sorbara, Minister

Training Module

Module Title

PERFORM VENDOR ANALYSIS

No.

U1980

Module Objective

MAINTAIN VENDOR PERFORMANCE RECORDS AND
IDENTIFY POSSIBLE IMPROVEMENTS AND REPLACEMENTS.

Date SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1980.01	analyze vendor performance	Assess client complaints Establish responsibility of vendor Review vendor's performance, current and historic Advise the vendor of concerns (verbal warning) Meet with vendors to clarify concerns, if necessary Prepare and document written warning Distribute to vendor and client Remove unsatisfactory vendors from sources list when necessary according to ministry policy and procedures	Ensure the use of qualified vendors.
1980.02	maintain current vendor records	Maintain records Update files Document performance and rate vendor Ensure the use of qualified vendors	Ensure record of qualified vendors is current and accurate.
1980.03	evaluate new, potential vendors	Identify potential vendors through: . vendor registration forms . trade journals . Ministry of Government Services sourcing lists . trade shows	

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1980.03	(continued)	Conduct financial analysis through, for example: . Dun and Bradstreet . audit statements . bank references Determine production capabilities including: . manpower . facilities . equipment Conduct reference checks Document and file	
1980.04	compare vendor performance to specifications/requirements	Compare performance to established specifications and standards Compare: . timeliness of order . completeness of order . quality of goods/services Assess maintenance support service	Ensure performance meets requirements.

Ontario Ministry of Skills Development

Gregory Sorbara, Minister

Training Module

Module Title

PERFORM SUPERVISORY FUNCTION

No.

U1981

Module Objective

CARRY OUT TRAINING AND MONITOR STAFF PERFORMANCE ENSURING THAT GOVERNMENT POLICY IS FOLLOWED.

Date

SEPTEMBER 1987

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1981.01	assign and schedule work	Review requests and assign priorities Delegate to appropriate staff Monitor progress Modify priorities as required	Ensure assignments and schedules are done according to priorities and staff workloads.
1981.02	provide supervision to junior staff	Advise junior staff of: . performance standards . performance objectives . performance expectations Supply training manuals and aids Perform administrative functions, such as: . monitoring attendance . providing approvals as required . conducting training of subordinates . conducting orientation for subordinates Provide input to employee performance appraisals, such as: . production . attitude . skills	Ensure junior staff development and that performance standards are met by monitoring performance and conducting performance appraisals.
1981.03	interpret policy manual for staff	Ensure availability of: . current manuals . guidelines . directives Interpret guidelines and directives for staff Monitor compliance	Ensure staff follow policies by explaining them and monitoring compliance.

No.	Task To be able to:	Enabling Objectives	Terminal Performance Objective(s) Minimum acceptable standard(s)
1981.04	co-ordinate project teams	Form a team Convene meeting Provide input/information Document minutes Report results Distribute information as necessary	Ensure successful completion of a project by forming a team and reporting on the results.
1981.05	act for supervisor during short-term absence	Accept delegated authority, such as: . signing . managing staff . performing assigned administrative functions	Provide continual supervisory function by acting on behalf of an absent supervisor.

DACUM/COMPETENCY CHART
PURCHASING OCCUPATIONS

AREAS OF COMPETENCY

◀SKILLS▶

01 REVIEW REQUISITIONS	0101 CONFIRM SIGNING AUTHORITY	0102 CONFIRM ENTITLEMENT TO PURCHASE PRODUCT/SERVICE	0103 INTERPRET PURCHASING/ SUPPLY POLICIES AND PROCEDURES	0104 ASSIGN PRIORITIES TO OWN REQUISITIONS	0105 VET REQUISITIONS FOR COMPLETENESS: SHIPPING & INVOICE ADDRESS, DATE, BRANCH OFFICE/CODE, PRODUCT	0106 OBTAIN ADDITIONAL INFO, FROM REQUISITIONER, RETURN REQUISITION PURCHASE THROUGH PETTY CASH	0107 CONFIRM SPECIAL APPROVALS, E.G.	0108 DETERMINE POTENTIAL SOURCES FOR PRODUCT/	0109 DETERMINE AVAILABILITY THROUGH M.G.S. ASSETS DISPOSAL/ MINISTRY SURPLUS	0110 DETERMINE METHOD OF PURCHASE, E.G. BLANKET CONTRACT, STANDING ORDER, REQUEST FOR PURCHASE	0111 ESTIMATE COST OF COMMODITY	0112 DETERMINE SALES TAX AND DUTY EXEMPTION	0113 NOTIFY REQUISITIONER OF OF APPROVAL OR REJECTION WITH EXPLANATION			
02 SOURCE PRODUCT, SERVICE	0201 DETERMINE IF ITEM ON COLLECTIVE PURCHASING AGREEMENT (S.A.)	0202 SELECT SINGLE SOURCE UNDER SPECIFIC $ LIMIT	0203 OBTAIN AND RECORD TELEPHONE QUOTES UP TO A SPECIFIED $ AMOUNT	0204 PREPARE A REQUEST FOR QUOTATION (R.F.Q.) OR INVITATIONAL TENDER	0205 OBTAIN WRITTEN QUOTES	0206 DEVELOP CRITERIA WITH USER	0207 PREPARE REQUEST FOR PROPOSAL	0208 IDENTIFY DELIVERY REQUIREMENTS	0209 ADVISE I.D.R.B. OF INTENT TO TENDER	0210 PREPARE WRITTEN SPECIFICATIONS FOR GOODS AND SERVICES FOR FORMAL TENDER	0211 PREPARE TERMS AND CONDITIONS OF SUPPLY	0212 VET TERMS AND CONDITIONS OF TENDER WITH LEGAL BRANCH	0213 CONDUCT VENDOR BRIEFING	0214 DETERMINE VENDOR LIST AND WHO WILL RECEIVE TENDER	0215 APPROVE THE ACCURACY OF TYPED TENDERED DOCUMENT	0216 DECIDE DISTRIBUT METHOD F TENDER
03 EVALUATE TRANSACTIONS	0301 LOG IN SUBMISSIONS AND TIME OF ARRIVAL	0302 FORM EVALUATION COMMITTEE	0303 RECORD VENDOR AND $ VALUE BID ON OPENING RECORD	0304 PREPARE SPREADSHEET	0305 ANALYZE EACH SUBMISSION: ERRORS, SPECIAL CONDITIONS, COMPLETENESS	0306 RECORD BID AMOUNTS ON SPREADSHEETS	0307 PREPARE COMMENTS ON VARIANCES IN SUBMISSION	0308 DOCUMENT END USER CONCERNS	0309 RATE BIDDERS	0310 CONDUCT SITE VISIT TO VENDOR	0311 CONDUCT FINANCIAL ANALYSIS OF VENDOR	0312 CONDUCT REFERENCE CHECK ON VENDOR	0313 PREPARE TRANSACTION SUMMARY WITH RECOMMENDATION	0314 SEEK I.D.R.P. APPROVAL OF SELECTION (INDUSTRIAL DEVELOPMENT REVIEW PROCESS)	0315 OBTAIN SENIOR MANAGEMENT APPROVAL	
04 AWARD CONTRACTS AND ISSUE PURCHASE ORDERS	0401 CONFIRM TERMS AND CONDITIONS	0402 DOCUMENT TERMS AND CONDITIONS	0403 APPROVE PURCHASE UP TO SPECIFIC $ LIMIT	0404 INFORM END USER OF SUCCESSFUL VENDOR	0405 CONFIRM AWARD VERBALLY/LETTER OF INTENT	0406 ISSUE PURCHASE ORDER/CONTRACT	0407 ADVISE UNSUCCESSFUL BIDDERS	0408 DEBRIEF BIDDERS	0409 INFORM DECENTRALIZED OFFICES OF SUPPLY ARRANGEMENTS							
05 EXPEDITE CONTRACTS AND FOLLOW-UP PURCHASE ORDERS/CONTRACTS	0501 CONTACT SUPPLIERS TO CONFIRM DELIVERY	0502 CONFIRM DELIVERY STATUS WITH USER	0503 ESTABLISH DELIVERY STATUS OF PRODUCT, SERVICE WITH VENDOR	0504 ADVISE USER OF STATUS	0505 NEGOTIATE SUBSTITUTIONS OF PRODUCT/SPECIFICATIONS ALTERNATE DELIVERY ARRANGEMENTS	0506 DOCUMENT	0507 RFCEIVE ADVICE FROM USER OF UNSATISFACTORY/ DAMAGED GOODS	0508 INSPECT UNSATISFACTORY/ DAMAGED GOODS	0509 ADVISE VENDOR OF UNSATISFACTORY/ DAMAGED GOODS	0510 ARRANGE PICK-UP EXCHANGE OF GOODS	0511 NEGOTIATE SUBSTITUTIONS WITH USER AND VENDOR OF DAMAGED GOODS	0512 ADVISE USER OF NEW ARRANGEMENTS	0513 ADVISE ACCOUNTING OF NEW ARRANGEMENTS (AMENDMENT TO P.O.)	0514 AMEND PURCHASE ORDER TO REFLECT CHANGE OR CANCELLATION		
06 MONITOR DECENTRALIZED PURCHASES	0601 CHECK FOR COMPLETENESS OF PURCHASE ORDERS	0602 CHECK FOR PURCHASES IN EXCESS OF SIGNING AUTHORITY	0603 CHECK FOR MISSING ORDERS	0604 CHECK FOR ADHERENCE TO STANDING AGREEMENTS AND STANDING OFFERS	0605 CHECK FOR COMPLIANCE WITH WITH QUOTATION PROCEDURES	0606 CHECK FOR SINGLE SOURCE PURCHASES FOR COMPLIANCE TO POLICY	0607 CHECK FOR UNUSUAL/UNIQUE PURCHASES	0608 CHECK FOR REPETITIOUS/PIECEMEAL PURCHASES WHICH MAY BE AVOIDING TENDERS/APPROVAL LEVELS	0609 IDENTIFY ITEMS REQUIRING SPECIAL APPROVAL	0610 IDENTIFY UNECONOMICAL USE OF PURCHASE ORDERS	0611 CHECK FOR ITEMS DESIGNATED AS CENTRAL PURCHASE	0612 PROVIDE APPROVAL FOR LOCAL PURCHASE OF ITEMS ON RESTRICTED LIST	0613 MEET WITH DECENTRALIZED CENTRES TO CLARIFY PURCHASING PROCEDURES	0614 IDENTIFY REPETITIOUS PURCHASES FOR CONSOLIDATION		
07 ADVISE USERS/VENDORS ON PURCHASING POLICIES AND PROCEDURES	0701 ACT AS TEAM MEMBER FOR PURCHASE OF GOODS OR SERVICES FOR LARGE PROJECTS	0702 EXPLAIN MARKET AND TENDER CONDITIONS FOR PRODUCT TO REQUISITIONERS	0703 EXPLAIN POLICY AND PROCEDURE ON SOLE SOURCING	0704 EXPLAIN MANDATORY/ OPTIONAL COMMON SERVICES	0705 ADVISE USERS OF PRODUCT RESEARCH RESULTS	0706 INTERPRET MINISTERIAL MANUAL, E.G. SIGNING AUTHORITY, SPECIAL APPROVAL	0707 INTERPRET PROVINCIAL MANUALS, E.G. ENTITLEMENT	0708 ADVISE USERS ON BLANK ORDERS	0709 ADVISE USER ON COSTS, E.G. TAXES, DUTIES, FREIGHT RATES	0710 ANALYZE USER NEEDS	0711 RECOMMEND PRODUCT/SERVICE TO USER	0712 MARKET PURCHASING SERVICES TO USER GROUPS, E.G. PUBLIC RELATIONS	0713 MAKE PRESENTATION TO TO USER GROUPS	0714 PROVIDE INPUT TO BULLETINS AND NEWSLETTERS	0715 ADVISE VENDOR ON HOW TO SELL TO GOVERNMENT AND INDIVIDUAL MINISTRIES	0716 PROVIDE COMMODITY SPECIFICA TO VENDOR
08 PERFORM ADMINISTRATIVE FUNCTIONS	0801 UPDATE VENDOR LISTS	0802 SERVE AS MINISTRY REPRESENTATIVE ON COMMODITY COMMITTEES	0803 REPRESENT MINISTRY AT TRADE SHOWS	0804 PARTICIPATE IN MEETING AS DEPT. REPRESENTATIVE	0805 COMPOSE CORRESPONDENCE, E.G. LETTERS, MEMOS	0806 PREPARE MONTHLY WORKLOAD REPORTS	0807 CONTACT USERS/ VENDORS BY TELEPHONE	0808 MAINTAIN PERSONAL/ WORKING FILES	0809 MAINTAIN COMMODITY LIBRARY OF CATALOGUES, SAMPLES, PRICE	0810 KEYBOARD CORRESPONDENCE, PURCHASE ORDERS, AND CONTRACTS	0811 OPERATE APPLICATIONS SOFTWARE, E.G. SPREADSHEET, WORD PROCESSING	0812 CONSULT WITH COMPUTER SYSTEMS PERSONNEL	0813 CALCULATE COSTS ASSOCIATED WITH PURCHASE ORDERS, CONTRACTS, TENDERS	0814 ARRANGE FOR DISTRIBUTION OR PURCHASE ORDERS	0815 ARRANGE FOR PHOTOCOPY OF DOCUMENTS SUCH AS PURCHASE ORDERS, MEMOS	0816 PROVIDE I MINISTRY AND PROCE
09 CONDUCT PRODUCT RESEARCH AND MONITOR MARKET	0901 ATTEND TRADE SHOWS	0902 INTERVIEW SALES/TECHNICAL REPRESENTATIVES	0903 INTERPRET TRADE PERIODICALS	0904 DEVELOP COMMODITY/VENDOR FILES	0905 ATTEND EQUIPMENT DEMONSTRATIONS TO EVALUATE EQUIPMENT	0906 CONDUCT EQUIPMENT TRIALS FOR EVALUATION	0907 CONDUCT SITE VISITS	0908 ANALYZE USER COMPLAINTS	0909 INTERPRET PERFORMANCE AND MANUFACTURING STANDARDS AND SPECS, E.G. CGSB, CSA, ASTM, HYDRO	0910 CONSULT WITH SUPPLIERS	0911 CONDUCT REFERENCE CHECK ON VENDORS/ PRODUCT/SERVICE	0912 LIAISE WITH MANUFACTURERS AND I.T.T. ON DEVELOPMENT OF NEW PRODUCTS	0913 PERFORM COST ESTIMATE, INCLUDING TAX, DUTIES	0914 DOCUMENT UNACCEPTABLE PRODUCT/SERVICES	0915 LIST ACCEPTABLE VENDORS	0916 PERFORM P PRE-QUAL
10 CONDUCT VENDOR ANALYSIS	1001 MAINTAIN VENDOR RECORDS	1002 ASSESS USER COMPLAINT	1003 DOCUMENT VENDOR ANALYSIS FOR FUTURE REFERENCE	1004 COMPARE PRODUCT AND SERVICE PERFORMANCE WITH TERMS AND CONDITIONS	1005 ASSESS TIMELINESS OF DELIVERIES	1006 ASSESS MAINTENANCE/ SERVICE SUPPORT	1007 DOCUMENT POOR VENDOR PERFORMANCE	1008 CONDUCT FINANCIAL ANALYSIS OF VENDOR	1009 CONFIRM VENDOR'S PERFORMANCE	1010 UPDATE VENDOR FILE	1011 NOTIFY VENDOR OF POOR PERFORMANCE	1012 PREPARE WRITTEN WARNING	1013 MEET WITH VENDOR TO CLARIFY CONCERNS	1014 RECORD DELETION OF VENDORS FROM REGISTERED LIST		
11 SUPERVISE PURCHASING	1101 ASSIGN PRIORITIES TO WORK LOAD	1102 SCHEDULE WORK FLOW	1103 MONITOR PROGRESS OF NEW STAFF	1104 PROVIDE DIRECTION TO JUNIOR STAFF	1105 MONITOR WORK FLOW OF JUNIOR PURCHASING STAFF	1106 PROVIDE FEEDBACK ON STAFF PERFORMANCE TO MANAGEMENT	1107 INTERPRET POLICY MANUAL FOR OTHER STAFF	1108 COORDINATE PROJECT TEAMS	1109 SHARE INFORMATION WITH PEERS: JUNIORS AND MANAGEMENT (COMMODITY, VENDORS, MARKETS)	1101 HANDLE COMPLAINTS AND CONCERNS	1111 ACT FOR SUPERVISOR DURING ABSENCE					

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DACUM/COMPETENCY CHART
PURCHASING OCCUPATIONS

◀SKILLS▶

Ministry of Skills Development
Ontario

UISITIONS PLETENESS: G & IN- DDRESS, RANCH OFF- E, PRODUCT	OBTAIN ADDITIONAL INFO, FROM REQUISITIONER, RETURN REQUISITION PURCHASE THROUGH PETTY CASH 0106	CONFIRM SPECIAL APPROVALS, E.G. 0107	DETERMINE POTENTIAL SOURCES FOR PRODUCT/ 0108	DETERMINE AVAILABILITY THROUGH M.G.S. ASSETS DISPOSAL/ MINISTRY SURPLUS 0109	DETERMINE METHOD OF PURCHASE, E.G. BLANKET CONTRACT, STANDING ORDER, REQUEST FOR PURCHASE 0110	ESTIMATE COST OF COMMODITY 0111	DETERMINE SALES TAX AND DUTY EXEMPTION 0112	NOTIFY REQUISITIONER OF OF APPROVAL OR REJECTION WITH EXPLANATION 0113							
WRITTEN	DEVELOP CRITERIA WITH USER 0206	PREPARE REQUEST FOR PROPOSAL 0207	IDENTIFY DELIVERY REQUIREMENTS 0208	ADVISE I.D.R.B. OF INTENT TO TENDER 0209	PREPARE WRITTEN SPECIFICATIONS FOR GOODS AND SERVICES FOR FORMAL TENDER 0210	PREPARE TERMS AND CONDITIONS OF SUPPLY 0211	VET TERMS AND CONDITIONS OF TENDER WITH LEGAL BRANCH 0212	CONDUCT VENDOR BRIEFING 0213	DETERMINE VENDOR LIST AND WHO WILL RECEIVE TENDER 0214	APPROVE THE ACCURACY OF TYPED TENDERED DOCUMENT 0215	DECIDE DISTRIBUTION METHOD FOR TENDER 0216	PREPARE ADDENDUM OR AMENDMENT PRIOR TO CLOSING 0217				
EACH ION- SPECIAL ONS, ENESS	RECORD BID AMOUNTS ON SPREADSHEETS 0306	PREPARE COMMENTS ON VARIANCES IN SUBMISSION 0307	DOCUMENT END USER CONCERNS 0308	RATE BIDDERS 0309	CONDUCT SITE VISIT TO VENDOR 0310	CONDUCT FINANCIAL ANALYSIS OF VENDOR 0311	CONDUCT REFERENCE CHECK ON VENDOR 0312	PREPARE TRANSACTION SUMMARY WITH RECOMMENDATION 0313	SEEK I.D.R.P. APPROVAL OF SELECTION (INDUSTRIAL DEVELOPMENT REVIEW PROCESS) 0314	OBTAIN SENIOR MANAGEMENT APPROVAL 0315						
AWARD Y/LETTER NT	ISSUE PURCHASE ORDER/CONTRACT 0406	ADVISE UNSUCCESSFUL BIDDERS 0407	DEBRIEF BIDDERS 0408	INFORM DECENTRALIZED OFFICES OF SUPPLY ARRANGEMENTS 0409												
TE SUB- ONS OF /SPECIFI- ALTER- LIVERY MENTS	DOCUMENT 0506	RECEIVE ADVICE FROM USER OF UNSATISFACTORY/ DAMAGED GOODS 0507	INSPECT UNSATISFACTORY/ DAMAGED GOODS 0508	ADVISE VENDOR OF UNSATISFACTORY/ DAMAGED GOODS 0509	ARRANGE PICK-UP EXCHANGE OF GOODS 0510	NEGOTIATE SUBSTITUTIONS WITH USER AND VENDOR OF DAMAGED GOODS 0511	ADVISE USER OF NEW ARRANGEMENTS 0512	ADVISE ACCOUNTING OF NEW ARRANGEMENTS (AMENDMENT TO P.O.) 0513	AMEND PURCHASE ORDER TO REFLECT CHANGE OR CANCELLATION 0514							
OR NCE WITH OTATION RES	CHECK FOR SINGLE SOURCE PURCHASES FOR COMPLIANCE TO POLICY 0606	CHECK FOR UNUSUAL/UNIQUE PURCHASES 0607	CHECK FOR REPETITIOUS/PIECEMEAL PURCHASES WHICH MAY BE AVOIDING TENDERS/APPROVAL LEVELS 0608	IDENTIFY ITEMS REQUIRING SPECIAL APPROVAL 0609	IDENTIFY UNECONOMICAL USE OF PURCHASE ORDERS 0610	CHECK FOR ITEMS DESIGNATED AS CENTRAL PURCHASE 0611	PROVIDE APPROVAL FOR LOCAL PURCHASE OF ITEMS ON RESTRICTED LIST 0612	MEET WITH DECENTRALIZED CENTRES TO CLARIFY PURCHASING PROCEDURES 0613	IDENTIFY REPETITIOUS PURCHASES FOR CONSOLIDATION 0614							
USERS OF RESEARCH	INTERPRET MINISTERIAL MANUAL, E.G. SIGNING AUTHORITY, SPECIAL APPROVAL 0706	INTERPRET PROVINCIAL MANUALS, E.G. ENTITLEMENT 0707	ADVISE USERS ON BLANK ORDERS 0708	ADVISE USER ON COSTS, E.G. TAXES, DUTIES, FREIGHT RATES 0709	ANALYZE USER NEEDS 0710	RECOMMEND PRODUCT/SERVICE TO USER 0711	MARKET PURCHASING SERVICES TO USER GROUPS, E.G. PUBLIC RELATIONS 0712	MAKE PRESENTATION TO TO USER GROUPS 0713	PROVIDE INPUT TO BULLETINS AND NEWSLETTERS 0714	ADVISE VENDOR ON HOW TO SELL TO GOVERNMENT AND INDIVIDUAL MINISTRIES 0715	PROVIDE COMMODITY SPECIFICATIONS TO VENDORS 0716	PROVIDE OVERVIEW OF POTENTIAL MINISTRY'S COMMODITY NEEDS AND USERS 0717	ARBITRATE BETWEEN VENDOR AND USER 0718	REFER PURCHASING IRREGULARITIES TO SUPERVISOR/ MANAGER 0719	PROVIDE ADVICE TO USERS ON PROPOSED RFP'S, TENDERS, SPECIFICATIONS 0720
ONDENCE, TTERS,	PREPARE MONTHLY WORKLOAD REPORTS 0806	CONTACT USERS/ VENDORS BY TELEPHONE 0807	MAINTAIN PERSONAL/ WORKING FILES 0808	MAINTAIN COMMODITY LIBRARY OF CATALOGUES, SAMPLES, PRICE 0809	KEYBOARD CORRESPONDENCE, PURCHASE ORDERS, AND CONTRACTS 0810	OPERATE APPLICATIONS SOFTWARE, E.G. SPREADSHEET, WORD PROCESSING 0811	CONSULT WITH COMPUTER SYSTEMS PERSONNEL 0812	CALCULATE COSTS ASSOCIATED WITH PURCHASE ORDERS, CONTRACTS, TENDERS 0813	ARRANGE FOR DISTRIBUTION OR PURCHASE ORDERS 0814	ARRANGE FOR PHOTOCOPY OF DOCUMENTS SUCH AS PURCHASE ORDERS, MEMOS 0815	PROVIDE INPUT TO MINISTRY POLICIES AND PROCEDURES 0816	LIAISE WITH FINANCIAL DEPARTMENT AND END USERS 0817	LIAISE WITH OTHER GOVERNMENT MINISTRIES ON DELEGATE COMMODITIES 0818		
EQUIPMENT RATIONS UATE NT	CONDUCT EQUIPMENT TRIALS FOR EVALUATION 0906	CONDUCT SITE VISITS 0907	ANALYZE USER COMPLAINTS 0908	INTERPRET PERFORMANCE AND MANUFACTURING STANDARDS AND SPECS, E.G. CGSB, CSA. ASTM, HYDRO 0909	CONSULT WITH SUPPLIERS 0910	CONDUCT REFERENCE CHECK ON VENDORS/ PRODUCT/SERVICE 0911	LIAISE WITH MANUFACTURERS AND I.T.T. ON DEVELOPMENT OF NEW PRODUCTS 0912	PERFORM COST ESTIMATE, INCLUDING TAX, DUTIES 0913	DOCUMENT UNACCEPTABLE PRODUCT/SERVICES 0914	LIST ACCEPTABLE VENDORS 0915	PERFORM PRODUCT PRE-QUALIFICATION 0916					
ESS OF IES	ASSESS MAINTENANCE/ SERVICE SUPPORT 1006	DOCUMENT POOR VENDOR PERFORMANCE 1007	CONDUCT FINANCIAL ANALYSIS OF VENDOR 1008	CONFIRM VENDOR'S PERFORMANCE 1009	UPDATE VENDOR FILE 1010	NOTIFY VENDOR OF POOR PERFORMANCE 1011	PREPARE WRITTEN WARNING 1012	MEET WITH VENDOR TO CLARIFY CONCERNS 1013	RECORD DELETION OF VENDORS FROM REGISTERED LIST 1014							
WORK JUNIOR ING	PROVIDE FEEDBACK ON STAFF PERFORMANCE TO MANAGEMENT 1106	INTERPRET POLICY MANUAL FOR OTHER STAFF 1107	COORDINATE PROJECT TEAMS 1108	SHARE INFORMATION WITH PEERS: JUNIORS AND MANAGEMENT (COMMODITY, VENDORS, MARKETS) 1109	HANDLE COMPLAINTS AND CONCERNS 1101	ACT FOR SUPERVISOR DURING ABSENCE 1111										

May 1987